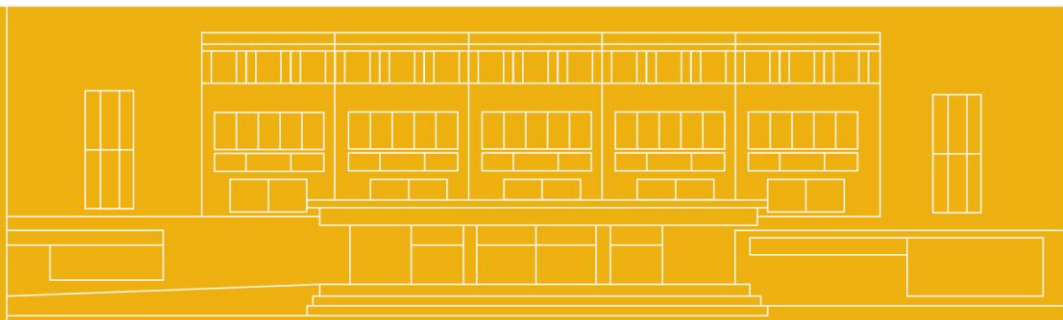


# RECORDS MANAGEMENT TIPS



March 2014

## Steps to Take as a New Records Officer

The purpose of this document is to provide direction to new records officers on the steps they should take to fulfill their responsibilities.

After submitting a Records Officer Designation and Responsibilities (RM-25 Form) to the Library of Virginia (LVA), the following five steps will ensure that a new records officer sets off on the path to enabling an effective records management program within their agency or locality.

### **1. Make your role and responsibilities as the records officer visible**

Have senior management display support for and understanding of the program and your role within it by announcing your appointment to all staff. Management should send a clear message that cooperation and compliance are expected from everyone.

### **2. Become familiar with the records retention schedules, policies, and guidelines set forth by LVA**

Review the records retention and disposition schedules, Virginia Public Records Management Manual, and other resources provided by LVA. These set the foundation for fulfilling the responsibilities of the records officer role such as overseeing the destruction, reformatting, and/or recovery of public records.

### **3. Assess the current records management needs of the agency**

Evaluate the current records management practices of the agency to determine areas that are in need of development and improvement. Conduct an inventory of all public records created and used by the agency and review the Certificates of Records Destruction (RM-3 Forms) submitted in the last year. Remember to include records in both paper and electronic formats. Your results will determine which departments you work with first to update retention schedules and encourage records destruction.

### **4. Develop policies, procedures, and training programs for the agency**

Develop internal records management policies and procedures that are approved by senior management and disseminate and provide training on those policies and procedures. Offer training to all staff at least once a year.

### **5. Appoint records coordinators if/when needed**

The ongoing maintenance of a records management program can warrant the need for additional assistance. Designating additional staff members as records coordinators within their department/ division creates a network of individuals who share responsibility for oversight and compliance.

Records Analysis Section: [www.lva.virginia.gov/agencies/records/](http://www.lva.virginia.gov/agencies/records/)